


LGL ONBOARDING checklist



Use this checklist to get up and running with Little Green Light.

 Click on any item for more detailed information.

Step 1

SET UP YOUR LGL ACCOUNT

- Create an LGL account
- Subscribe to LGL
- Add users to account
- Personalize your account
- Set addressee and salutation preferences
- Turn on address verification
- Enable LGL Email
- Activate LGL Forms

Step 2

MANUALLY ADD DATA

- Add a constituent record for yourself
- Add a gift to your constituent record
- Review use of Constituent Categories
- Add a new Constituent category
- Review gift coding options
- Create 5-10 new constituent records
- Add gifts to those records with gift coding

Step 3

ACKNOWLEDGE GIFTS

- Create a printed acknowledgment template
- Create an email acknowledgment template
- Apply an ack template to a gift record
- Add an image to your mailings and emails
- Learn to use LGL merge fields in mailings and emails

Step 4

IMPORT HISTORICAL DATA

- Preparing for migration
- Compare your import file to a sample file
- Using the Flex Importer
- LGL Data Dictionary

LGL TRAINING & SUPPORT

We provide a variety of free resources to help you get the most out of your LGL account. Visit the [Help page](#) in your LGL account to access them all or click on each item to learn more.

Live webinars

[LGL Introductory Tour](#)

[LGL Basic Training course](#)

[Q&A sessions with LGL staff](#)

On demand resources

[LGL Knowledge Base](#)

[LGL Video Library](#)

[LGL User Community](#)

[LGL Blog](#)

Live email support

[LGL Support](#)

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